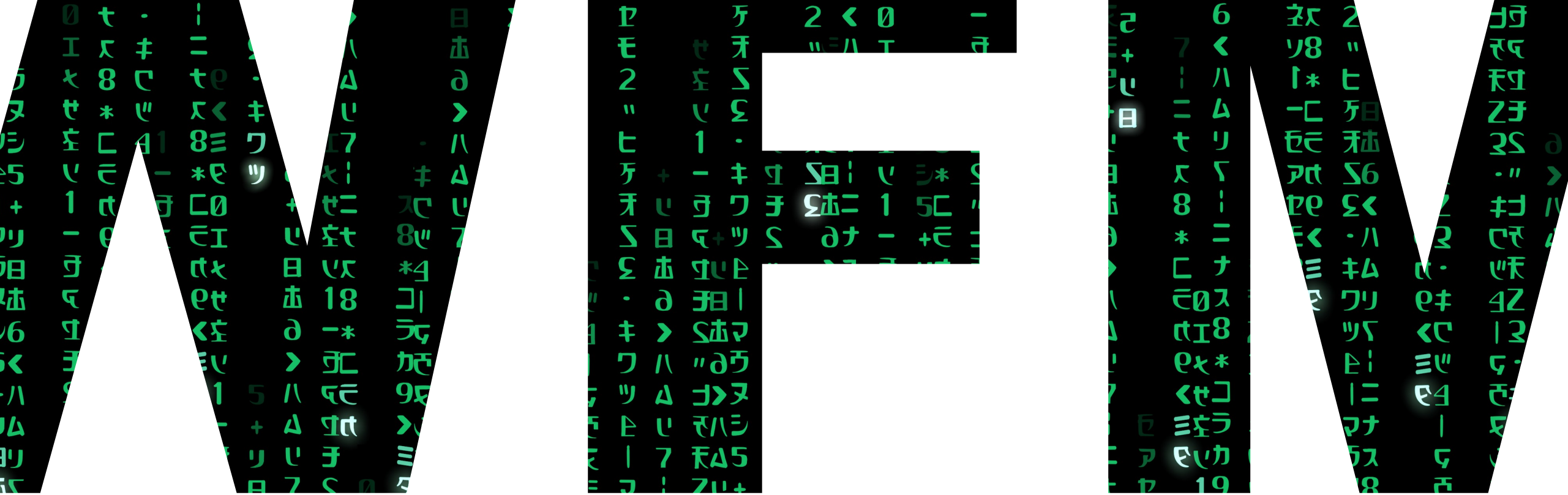

HRA Automation Process Improvement (HAPI Tool)

Ehlwyn Ivan Magbanua
Workforce Department

DEFINE Phase Templates:

1. Project Charter
2. SIPOC
3. Kano Analysis
4. Performance Standard

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Project Charter

<HRA Claims Process Improvement>

Problem Statement

The current average turnaround time stands at 3-4 minutes, leading to consequential outcomes such as mandatory overtime and a failure to meet the Service Level Agreement (SLA) of 72 hours.

Goal Statement

In order to enhance the efficiency of claim processing, our goal is to decrease the average turnaround time from the current range of 3-4 minutes to a more streamlined 1-2 minutes. Additionally, we aim to significantly reduce the overall processing time for the entire request list, aiming for a transition from the current 3 days to a more expedited 1-day processing period.

Project Scope

Process Start: Initiation occurs upon the supervisor distributing the Claims Request List to all accessible analysts.

Process End: The conclusion transpires when the agent successfully inputs all requisite information into the claim form and creates it proficiently.

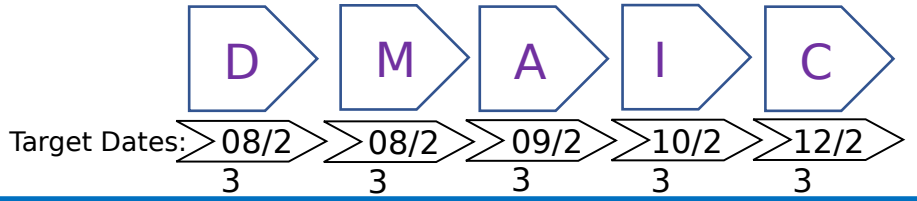
IN

Employers with Deductible, Copay and Co-Insurance

OUT

Terminated Employers
No available accounts
No Valid Enrollments
No info in Database

Project Timeline



Importance

NON-Financial Benefits	Financial Benefits
1. To streamline the creation of a claim number and reduce processing time. 2. To fulfill the SLA requirement with a precision rate of 95%. 3. Optimizing efficiency through manpower reduction.	1. To minimize the necessity for mandatory overtime by either reducing it to one hour or eliminating it altogether. 2. Cost Savings

Project Team

Sponsor: Gautam Ramdev
Champion: Cris Alcovendas
Green Belt: Errol Padilla
Black Belt: Arif Farhan

Team Members/ Subject Matter Experts:

1. Dexter Ramos
2. Chairo Lazada
3. Jovan Hanap
4. Kathleen Dela Cruz
5. Mark Nikko Libed

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SIPOC DIAGRAM

Suppliers	Inputs	Process	Outputs	Customer
• Customer/Employer	• Claim Request Submission Form	Inquiry Validation 1	• Filled-out Submission form	• Onshore
• Onshore	• Filled-out Submission form • Initial requirements	Submission Form Processing / Collections 2	• Collected/Filtered Submission Form List	• HRA Operations
• HRA Operations	• Collected/Filtered Submission Form List	DOCUMENTATIO N & CASE PROCESSING <HRA Agent> 3	• Claims Submission List (with created Claim Numbers)	• Onshore

END

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Kano Analysis

	MUST BE	MORE IS BETTER	DELIGHTERS
Claims Creation	• Creation must be completed within a 72-hour timeframe. • Unfulfilled requests or lines should be sent back to onshore for resolution.	• Claims are generated without the need for any mandatory overtime. • Free up time for additional tasks or maximize overall efficiency.	• Group Claims Submission (2 or more lines)

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Performance Standard

A performance standard translates customer needs into quantified requirements for our product or process

Creating Claims for 3-4 minutes

- **Unit/Request** → One Claim Request (One line/row in the claims request list)
- **Output Characteristic** → Quality
- **Project Y Operational definition** → The Agent process a claims request.
- **Target** → Reducing the TAT of processing claims.
- **Specification limit(s)** → LSL = 2 minutes
- **Defect** → The agent processes a claims request, encountering a specific error that may lead to a further delay in its processing.
- **No of Defect Opportunities Per Unit/Request** → 1

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MEASURE Phase Templates:

1. Baseline Data (Graphs and Statistics).
2. Process Sigma Score.
3. Current-State Process Value Stream Map (VSM).

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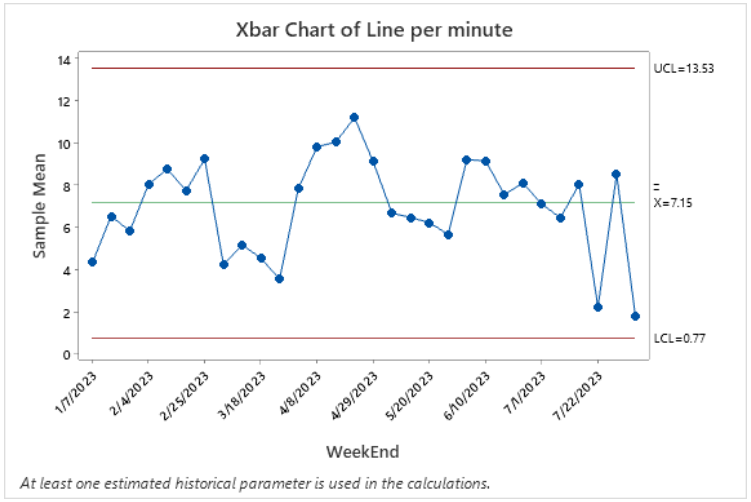
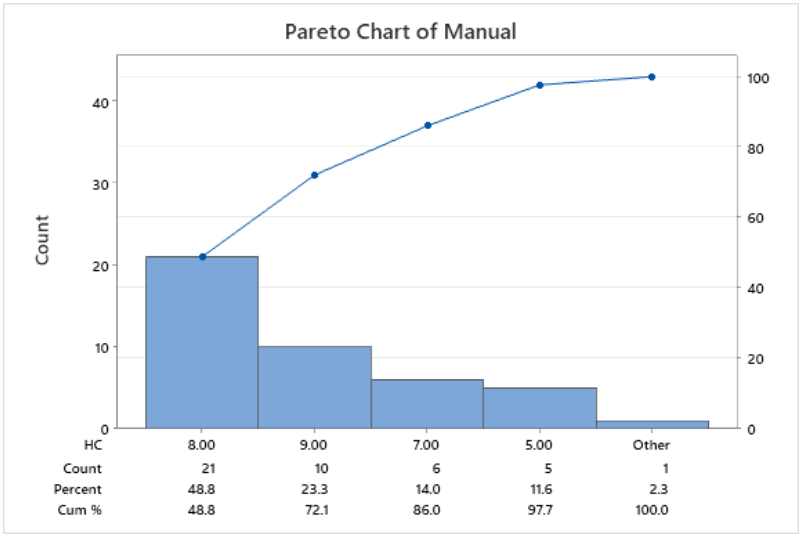
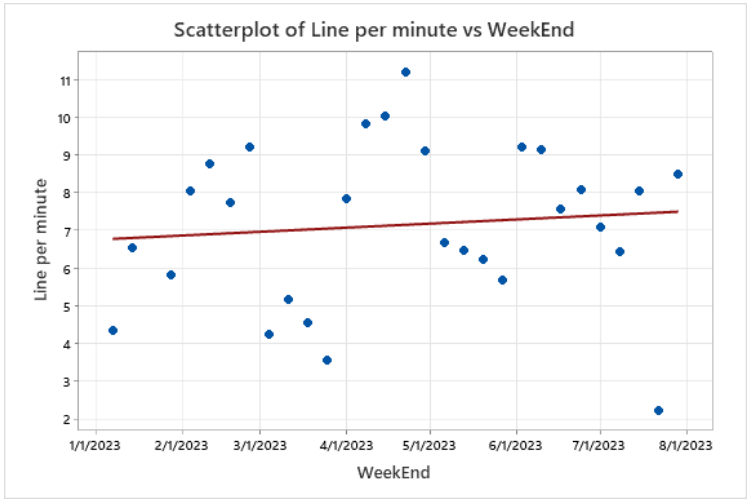
Baseline Data (Graphs & Statistics)







The current average process time stands at **7.15** minutes, and there is a discernible upward trend over time, as indicated by the scatterplot. The Pareto Chart analysis highlights a clear correlation between the need for additional headcount and process completion. However, it is crucial to recognize that augmenting the team size could potentially compromise overall team efficiency.

Pareto Chart proves that due to the Volume, more people are needed and more than 5 HC are considered as Overtime.

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Process Sigma Score

Calculating Process Sigma: Method 1 <**Pre Improvement units processed are all manual**>	
	<2023/ Jan - Nov>
1. Determine number of defect opportunities	O = 1
2. Determine number of units processed	N = 16093
3. Determine total number of defects made	D = 8
4. Calculate Defects Per Opportunity	DPO = 0.04417%
5. Calculate Yield	Yield = 99.9558%
6. Look up Sigma in the Process Sigma Table	4.1

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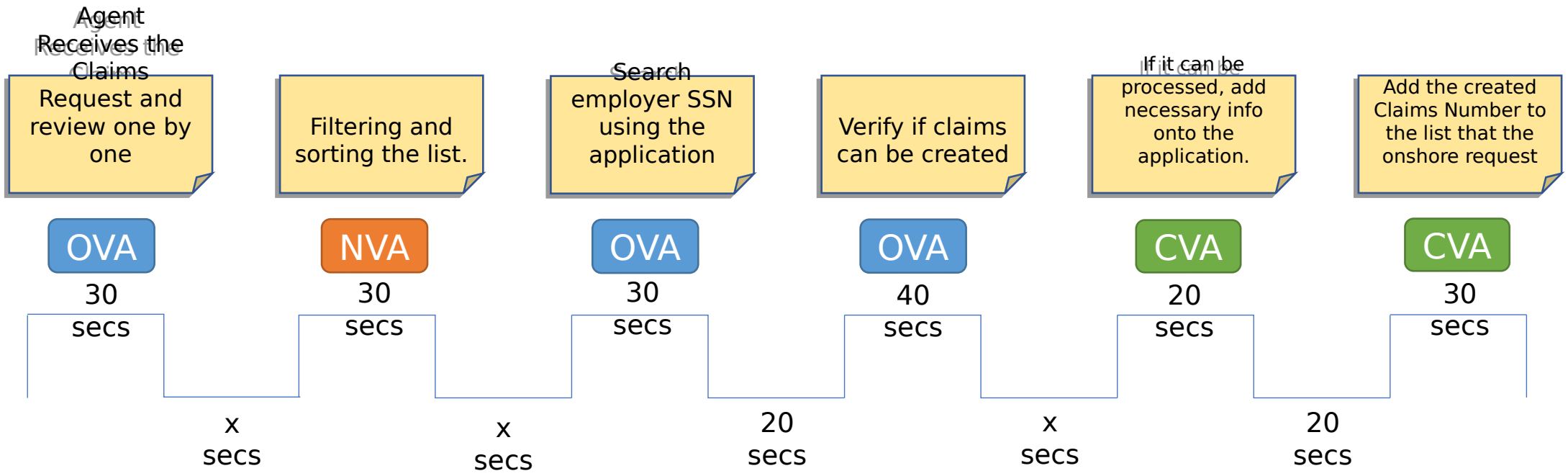
Current State Value Stream Map



VSM Summary Box	Time in secs	%
Total Processing	180	81.82%
Total Waiting Time	40	18.18%
Cycle Time	220	

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ANALYZE Phase Templates:

1. Data Analysis- Baseline/ Results of Data Collection (Graphs, hypothesis testing, regression analysis, etc.- use what is applicable).
2. Impact vs Control Matrix.

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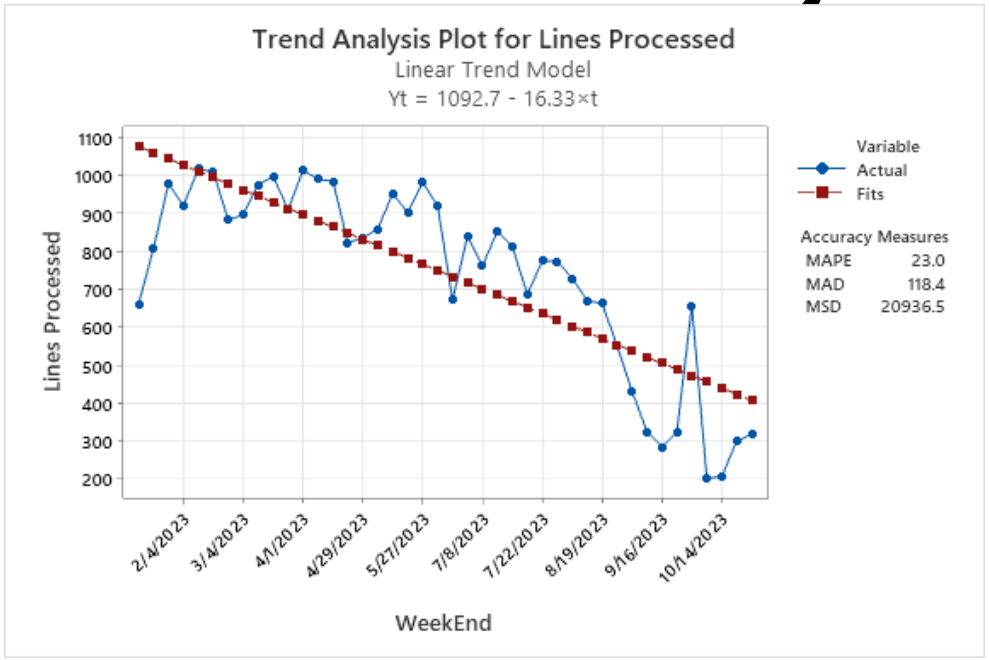
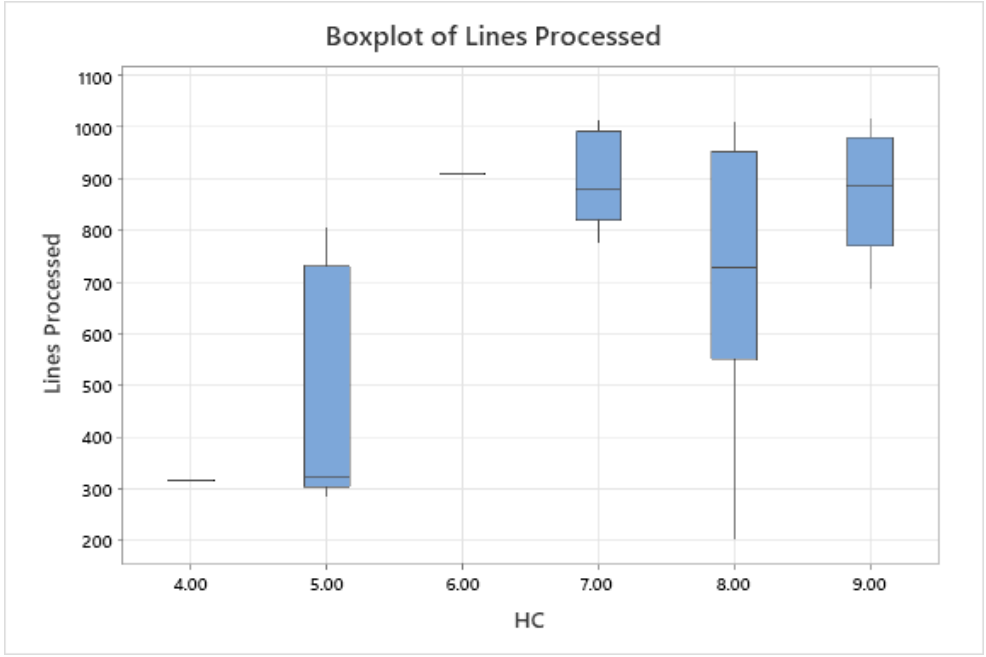
Data Analysis





The graphical representation illustrates a direct correlation between headcount and Lines Processed. Forecasted that Volume is gradually decreasing by approximately 30% towards the end of the year. Nevertheless, processing the entire list necessitates an allocation of more than 5 Head Count resources.

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Impact vs Control Matrix

IMPACT

CONTROL	High	Low
In Our Control	Shortage of agent Mandatory Overtime	Availability of the Lead to clean the list Mistyping information to the System Duplicate Requests Insufficient training Wrong Employer Information
Out Of Our Control	Long Loading Time of the System Claim Creation Error Long System downtime Erratic Queue Times Request amount bigger than the Employer Balance	Requests after the final filing date Requests outside the Plan Year

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IMPROVE Phase Templates:

1. Improvement Matrix.
2. Action Items.
3. Future-State Value Stream Map (VSM).
4. Tools for Displaying Results.
5. Process Sigma Score.
6. Computation of Cost Savings (If applicable).

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Improvement Matrix

Improvement Goals From →	To
Processors on most occasions are more than 5 Headcount. In a day with more than 5 processors, efficiency is reduced as they are dependent in their co-processors. Full List completion takes about 2-3 days with more than 5 HC Errors were seen due to Manual Process (Syntax error in typing the information) and take longer to process. Raw data in sharepoint was too ‘unorderly’ and needs to be cleaned time to time and are prone to data inconsistency (ex. October Data)	Processors can be reduced to 1 or 2 on most occasions. Efficiency due to the objective of the Improvement tool Full List completion takes about 1 day max and can be reduced if 2 or more users will use the new system Using the new system, errors will be reduced as human intervention in most stages of the process are present. While using the new system, data will be kept to a clear and simplified table inclusive of time. This will ensure the data is accurate and timed precisely as well.

Action Items Template part 1

Status	Action Items	Person Responsible	Timeline	Update/Remarks
	Collect historical data January to Sept 2023	Errol Padilla	Sept 4	Raw Data was extracted successfully
	Created the Process Improvement Tool	Errol Padilla	Sept 5	On track but still in review for bugs and errors
	Process the Claims Creation for the week	Jovan Hanap	Sept 5	Processed, encountered errors and was delayed
	Tool Encountered bugs	Errol Padilla	Sept 6	Delayed due to bugs, tried to improve (Connection Issues)
	Tool was fixed and Improved	Errol Padilla	Sept 10	Fixed the current bugs and Shorten Delays
	Process the Claims Creation for the week	Jovan Hanap	Sept 13	Processed, encountered errors and was delayed
	Tool Encountered bugs	Errol Padilla	Sept 14	Delayed due to bugs, tried to improve (Codes Expansion)
	Tool was fixed and Improved	Errol Padilla	Sept 17	Fixed the current bugs and Shorten Delays
	Process the Claims Creation for the week	Jovan Hanap	Sept 19	Processed, encountered errors and was delayed
	Operations requested for delays to shorten even further	Errol Padilla	Sept 21	No Errors but expanded the codes to be more dynamic

Danger of Extended Delay Delayed but Moving Complete or On Track

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Action Items Template part 2

Status	Action Items	Person Responsible	Timeline	Update/Remarks
🟢	Tool was fixed and Improved	Errol Padilla	Sept 24	Fixed the current bugs and Shorten Delays
🟡	Process the Claims Creation for the week	Jovan Hanap	Sept 26	Processed, encountered errors and was delayed
🟡	Tool Encountered bugs	Errol Padilla	Sept 28	Delayed due to bugs, tried to improve (Bugs on new update)
🟢	Tool was fixed and Improved	Errol Padilla	Oct 1	Fixed the current bugs and Shorten Delays
🟡	Process the Claims Creation for the week	Jovan Hanap	Oct 3	Processed, encountered errors and was delayed
🟡	Process the Claims Creation for the week	Jovan Hanap	Oct 4	Processed, encountered errors and was delayed
🟡🟢	Tool Encountered bugs	Errol Padilla	Oct 6	Delayed due to bugs, tried to improve (Codes Expansion)
🟡	Tool was fixed and Improved	Errol Padilla	Oct 8	Fixed the current bugs and Shorten Delays
🟡	Process the Claims Creation for the week	Jovan Hanap	Oct 11	Processed, encountered errors and was delayed
	Tool Encountered bugs	Errol Padilla	Oct 13	Delayed due to bugs, tried to improve (Connection Issues)

🔴 Danger of Extended Delay 🟡 Delayed but Moving 🟢 Complete or On Track

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Action Items Template part 3

Status	Action Items	Person Responsible	Timeline	Update/Remarks
🟢	Tool was fixed and Improved	Errol Padilla	Oct 15	Fixed the current bugs and Shorten Delays
🟡	Process the Claims Creation for the week	Jovan Hanap	Oct 18	Processed, encountered errors and was delayed
🟡	Tool Encountered bugs	Errol Padilla	Oct 20	Delayed due to bugs, tried to improve (Bugs on new update)
🟢	Tool was fixed and Improved	Errol Padilla	Oct 22	Added a proper data collector and fixed bugs
🟡	Process the Claims Creation for the week	Jovan Hanap	Oct 24	Processed and no encountered bugs/errors on the run
🟢	Tool and design is improved	Errol Padilla	Oct 29	Tool didn't encounter bugs from the new update
🟢	Process the Claims Creation for the week	Jovan Hanap	Nov 1	Processed and no encountered bugs/errors on the run
🟢	Process the Claims Creation for the week	Jovan Hanap	Nov 8	Processed and no encountered bugs/errors on the run
	Process the Claims Creation for the week	Jovan Hanap	Nov 14	Processed and no encountered bugs/errors on the run

🔴 Danger of Extended Delay 🟡 Delayed but Moving 🟢 Complete or On Track

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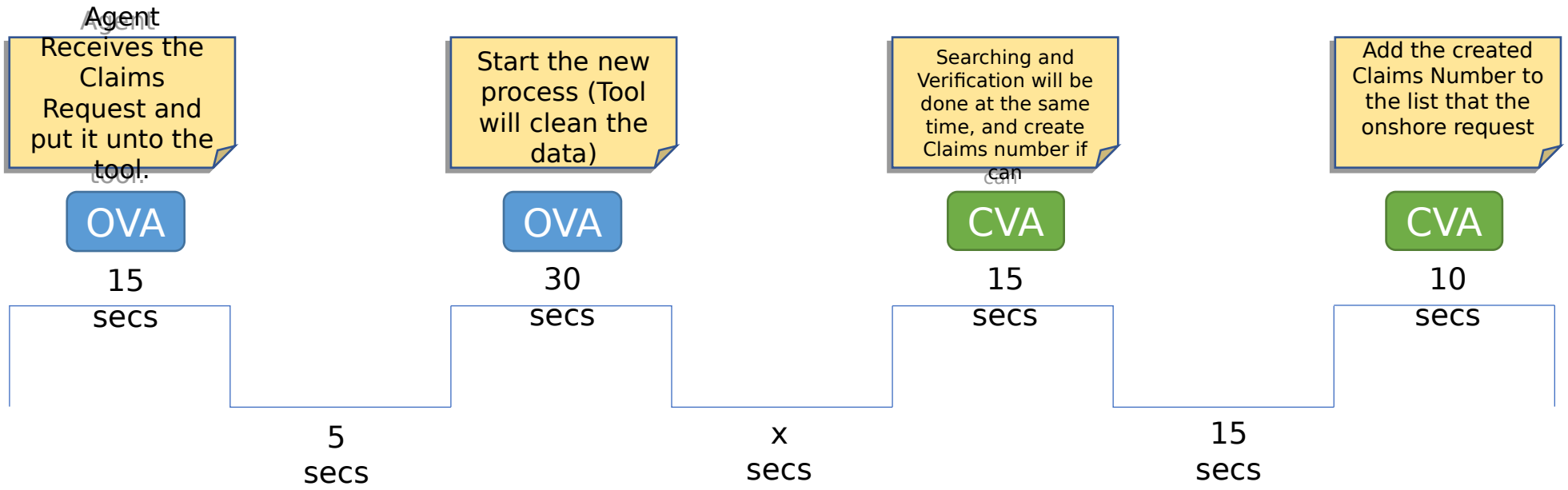
Future State Value Stream Map


Agent Receives the Claims Request and put it unto the tool.
Start the new process (Tool will clean the data)
Searching and Verification will be done at the same time, and create Claims number if can
Add the created Claims Number to the list that the onshore request
OVA
OVA
CVA
CVA
15 secs
30 secs
15 secs
10 secs
5 secs
x secs
15 secs

VSM Summary Box	Time in secs	%
Total Processing	70	77.78%
Total Waiting Time	20	22.22%
Cycle Time	90	

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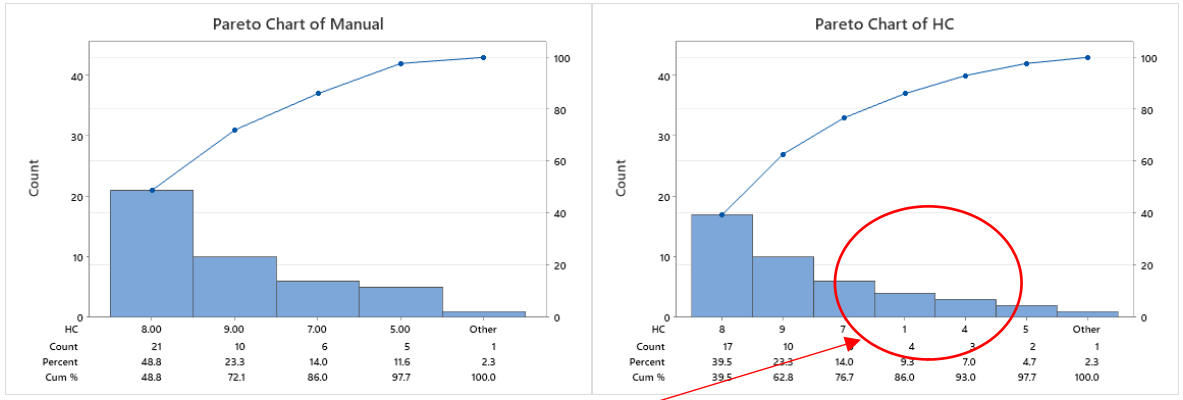
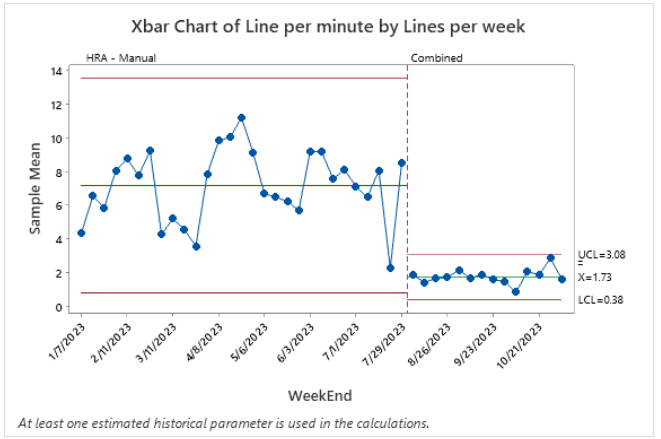
Tools for Displaying Results

Before-After Pareto Charts



Head Count was reduced on the latter months due to the new system. Low Headcount (HC) equals more hours to be saved.

Before-After Pareto Charts



Before-After Sigma Calculatio

	Old (Jan to Nov)	New (Aug to Nov)
1. Determine number of defect opportunities	O = 1	O = 1
2. Determine number of units processed	N = 16093	N = 4457
3. Determine total number of defects made	D = 8	D = 1
4. Calculate Defects Per Opportunity	DPO = 0.04417%	DPO = 0.02243%
5. Calculate Yield	Yield = 99.9558%	Yield = 99.978%

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Computation of Cost Savings

	Productivity	Hours to complete (Annum)
Pre	35	686
Post (only 2 out of 5 users)	49.7	384.286
Results	14.7	301.714 hours saved
SAVINGS per Annum		$4435.20

Rate = $14.7/hour
The primary objective of the account's baseline requirement is for 2 out of 5 users to successfully complete the Full Request List within a day. But scaling up the users will definitely increase the savings.

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CONTROL Phase Templates

1. Updated Process Maps, Operations Manual, Operations Manual, Training Manuals, Work Instructions, etc.
2. Lessons Learned.
3. Future Plans & Recommendations.
4. Photo of Certification: Letter, Email, etc. of project closure signed by the Executive Sponsor.
5. Other documents, photos, etc.

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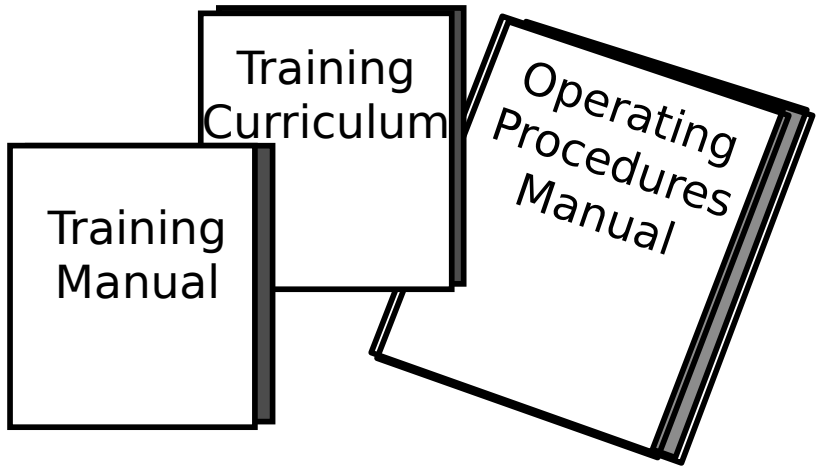
Updated Process Maps, Operations Manual, Operations Manual, Training Manuals, Work Instructions, etc.



These are the key documents in doing the new process correctly.

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Lessons Learned

Different problems should always have specific approaches to deal with them. It is crucial to recognize that there is no universal 'Panacea' or one-size-fits-all remedy capable of resolving every issue.

The **DMAIC** framework is at the core of doing the project, providing a structured approach to problem-solving. Each phase contributes to a systematic and iterative process for improvement.

Very challenging as communication between the team and the operations, gathering data, and collaborating ideas have a major impact in successfully doing the project and at the same time, lead to more efficiency, improved quality and increased customer satisfaction.

Future Plans & Recommendations

- Expand the scripts/codes that can be more dynamic in approaching the lines where the tool is unsuccessful in creating the claim number.

- Increase more productivity by expanding the project to othe accounts that are processed by the user (CPORTAL/EE Ticket creation)

- Consider user friendly tables and data sheets to be a substitute on the raw files (Needed to be cleaned files)

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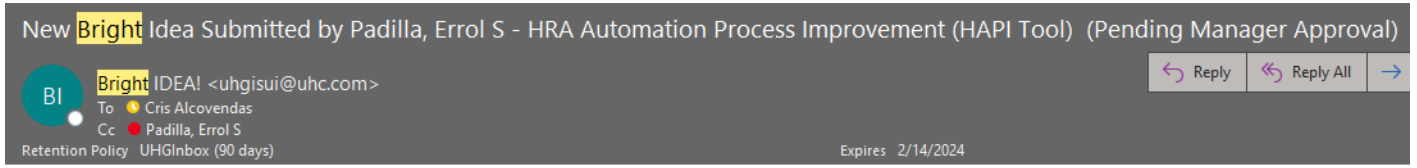
Photo of Certification: Letter, Email, etc. of project closure signed by the Executive Sponsor.



New Bright Idea Submitted by Padilla, Errol S - HRA Automation Process Improvement (HAPI Tool) (Pending Manager Approval)

Reply | Reply All

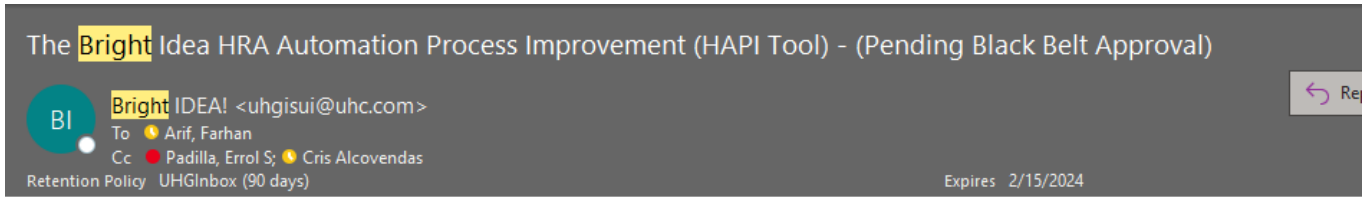
BI

Bright IDEA! <uhgisui@uhc.com>
To Cris Alcovendas
Cc Padilla, Errol S
Retention Policy UHGInbox (90 days) Expires 2/14/2024

Hi Cris Alcovendas,

The Bright Idea "HRA Automation Process Improvement (HAPI Tool)" has been submitted by Padilla, Errol S and is pending your approval.
Please take appropriate action before 11/28/2023.
To view and respond to this idea, please Click here

Thank You



The Bright Idea HRA Automation Process Improvement (HAPI Tool) - (Pending Black Belt Approval)

BI

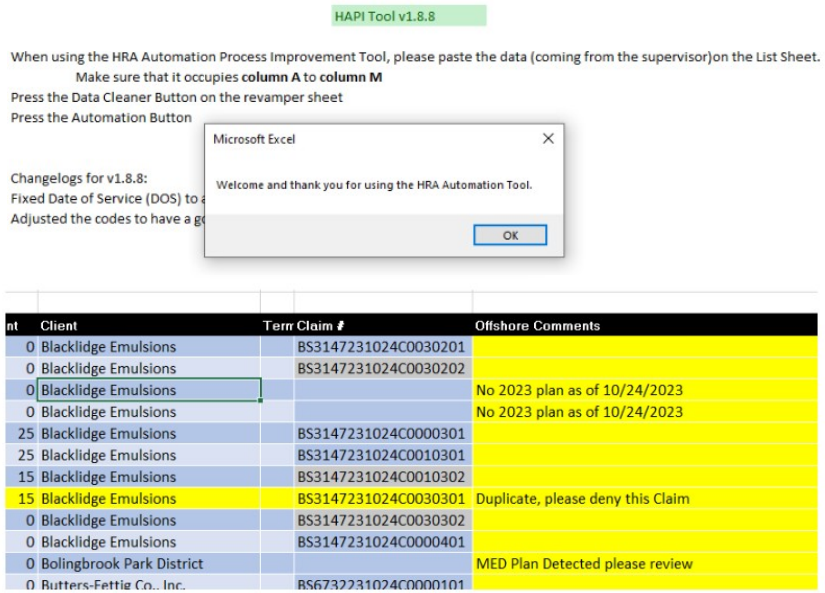
Bright IDEA! <uhgisui@uhc.com>
To Arif, Farhan
Cc Padilla, Errol S; Cris Alcovendas
Retention Policy UHGInbox (90 days) Expires 2/15/2024

Hi Arif, Farhan,

The Bright Idea "HRA Automation Process Improvement (HAPI Tool)" has been approved by manager on 11/17/2023 and is pending your response.
Please take appropriate action before 11/24/2023.
To view and respond to this idea, please Click here

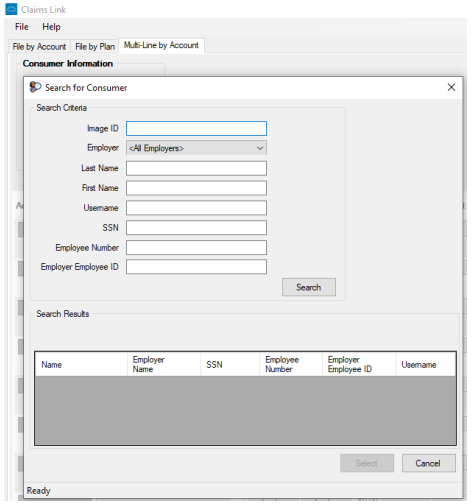
Thank You

Other Photos, Documents, etc.


HAPI Tool v1.8.8
When using the HRA Automation Process Improvement Tool, please paste the data (coming from the supervisor)on the List Sheet.
Make sure that it occupies column A to column M
Press the Data Cleaner Button on the revamper sheet
Press the Automation Button
Microsoft Excel
Welcome and thank you for using the HRA Automation Tool.
OK
Changelogs for v1.8.8:
Fixed Date of Service (DOS) to a
Adjusted the codes to have a g

nt	Client	Term	Claim #	Offshore Comments
0	Blacklidge Emulsions		BS3147231024C0030201	
0	Blacklidge Emulsions		BS3147231024C0030202	
0	Blacklidge Emulsions			No 2023 plan as of 10/24/2023
0	Blacklidge Emulsions			No 2023 plan as of 10/24/2023
25	Blacklidge Emulsions		BS3147231024C0000301	
25	Blacklidge Emulsions		BS3147231024C0010301	
15	Blacklidge Emulsions		BS3147231024C0010302	
15	Blacklidge Emulsions		BS3147231024C0030301	Duplicate, please deny this Claim
0	Blacklidge Emulsions		BS3147231024C0030302	
0	Blacklidge Emulsions		BS3147231024C0000401	
0	Bolingbrook Park District			MED Plan Detected please review
0	Butters-Fettig Co., Inc.		BS6732231024C0000101	

Screenshots are from the file that I created that will automate the creation of claim # (if successful) or put offshore comments (if unsuccessful).



Application that creates Claim numbers.

Here are the raw files and the sample of the tool that I've worked on

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